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ABSTRACT

This report summarizes the decisions of the Virginia Commonwealth University Joint Committee to Study Library Periodical Services that were scheduled for implementation for the fall 1987 semester. Approved decisions are outlined for the areas of: (1) photocopiers, including photocopy services and Vendacard; (2) bound volumes, including loan policies, linking, and tattle-tape; (3) open access to current periodicals, including access to materials and desk services, construction, security of materials, and circulation control; and (4) miscellaneous areas, including development of a policy and procedures manual, training of periodicals staff, additional services, binding quality, signage, and circulation of current and next day's issues of specified periodicals. A cost analysis of recommendations as approved is also provided. (KM)

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PERIODICALS COMMITTEE REPORT - SUMMARY OF DECISIONS

NOTE: Unless otherwise noted, all decisions given below will be implemented for the Fall 1987 semester (on or about August 20, 1987).

1. Photocopiers.

   a. Photocopy Services.

      1. ULS will continue in-house management of photocopy machines

      2. ULS will continue only self-service copying services.

   b. Vendacard.

      1. ULS has expanded the use of Vendacard on both campuses, including providing a preferential rate structure between Vendacard charges and coin-operated charges.

         Patrons will be reminded when purchasing cards to put their name and phone number on the card; if the card is found and returned to ULS, the patron will be called and told that the card may be picked up. Cards will be held only for six months, and thereafter will be discarded.

      2. Additional Vendacard machines have been installed where necessary. In particular, six additional Vendacard machines are scheduled to be installed in JBC.

      3. When all Vendacards are fully operational, there will be two photocopiers at TML and JBC (one in the circulation/reference area and one in periodicals) that can accept either coins or Vendacards.

         This will be reevaluated after one semester of operation. With the new differential pricing structure, any person making at least six copies would save money by purchasing a Vendacard. Posters indicating this will be prominently displayed near all copiers. Furthermore, with new photocopiers, it is unlikely that these machines will be down often.

         ULS will not implement a system for patrons to "check-out" a credited Vendacard from a service desk and then pay cash to the desk staff. The manual bookkeeping required would be substantial and would be prone to the errors that the Vendacard system was intended to stop. Furthermore, the greatly reduced costs of Vendacard copies (see below) will mean that it will be economically practical for nearly all users to use Vendacard instead of coin-operated copiers (the break even point for those not now holding a Vendacard will be five copies, and the patron will save money with six or more copies.)

      4. Expanded Use of Vendacard for Staff Use.

         a. In work areas where additional copier support is needed by staff, staff Vendacards will be issued for use of members of a department.

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b. Based upon discussion after the report was written, further investigation will be undertaken by the Business Office as to whether Vendacard would be practical in Special Collections and Archives to help reduce their cash handling and in Interlibrary Loan to reduce manual accounting.

c. Cost-per-Copy.

1. Vendacard copies: 5 cents per copy.

2. Coin-operated copies: 10 cents per copy.

3. Microform copies: 5 cents per copy with Vendacard, 10 cents per copy coin operated.

NOTES:

- Based upon comments received, the "philosophy of photocopy charges" was clarified. It is recognized that there are sometimes competing goals including: to increase patron convenience and satisfaction; to increase the preservation of the collection; to increase access to information; and to increase revenues. These are in approximate priority order, with the recognition that all these goals must be adequately balanced.

- This dramatic decrease in costs is being employed because: (1) the new technology employed in the new copiers makes it possible to reduce costs and (2) a lower cost should result in less theft and mutilation of library materials. Furthermore, funds recovered from copiers revert to the General Fund, and not to ULS.

- Only a two-tiered rate structure will be employed. Given drastically reduced cost of copies, no additional discount will be given for those purchasing Vendacards with an IDT.

d. Quality and Number of Photocopiers. ULS has replaced all copiers with high volume photocopiers manufactured by Oce. These copiers are being leased for one year to test their durability. Thereafter a decision will be made on whether to purchase these machines, lease them, or replace with copiers from a different manufacturer.

2. Bound Volumes.

Information on current holdings of volumes at the bindery or already bound is now available on ALIS through the Public Access Catalog (PAC). The first phase of the project to input these holdings is scheduled for completion this summer.

Bound volumes will be circulated to faculty, graduate students and staff (including Hospital house staff). This is a modification of present practice at TML (where undergraduates also may checkout books).

a. Loan Policies:

1. The maximum loan period for bound volumes is 48 hours with no renewals allowed. No more than twenty bound volumes may be checked-out simultaneously.

2. Overdue fine: $5.00 per day. Lost volume fine: $100.00. A special bookmark will be designed and placed in each circulating volume indicating the cost of the overdue fine and lost volume.

   The number of days before the first overdue notice is generated will be reduced from the present 14 days to ten days. Therefore, at the time that the first notice is printed the minimum fine would be $50.00. [Note: the actual notice may not be received by the patron for another 2-5 days.]

3. Noncirculating Core Collection. Collection Management will be responsible for determining "a core collection" of bound periodical titles will be for building use only (or, if necessary, for the secured area). (Some of these core titles are already purchased on microform at JBC). Circulation will be responsible for stamping each bound volume of the title as "Building Use Only."

b. Linking:

1. Statistics will be maintained for the first semester to judge the effect of lower photocopy costs on the number of bound volumes circulating. Using TML as the test case, if the number of volumes circulating drops significantly, and if the number of volumes circulating at JBC is low, the circulation of bound volumes policy may be reconsidered. If bound volumes are not circulated, comprehensive linking of the collection would not be necessary.

   Therefore, for the fall semester, the retrospective volumes (which are not linked) will be emergency circulated using ALIS. These volumes will not be linked on circulation and therefore volume specific information about them will not appear in PAC as being charged out.

2. All new bound volumes will be linked as they are bound so that the ALIS holdings information will be updated and the bindery location will show in PAC.

c. Tattle-tape.

1. ULS will continue tattle-taping all bound volumes for both libraries.

2. Only programmable tattle-tape will be used in bound volumes on both campuses.

3. Special, nonobtrusive, circulation desk procedures will be developed at JBC to allow patrons to take out retrospective volumes with nonprogrammable tapes.

3. Open Access to Current Periodicals.

a. Access to Materials and Desk Services.

1. **Access to Materials.** Current periodicals stacks will be open to faculty and graduate students and closed to undergraduates on both campuses. (See also 3.d. "Circulation Control" below)

NOTE: the loss rate of current periodicals on both campuses is consistently too high, with approximately 9% to 12% of volumes not bound because at least one issue is missing. The replacement costs for these issues is high (especially for foreign and scientific titles). Closed desk access and improved security measures (see also 3.c. "Security of Materials" below) should better preserve the collection and make better use of limited resources to purchase new materials rather than having to replace them.

2. **Periodicals Assistance at TML.** A periodicals assistance desk has been established by the Acquisition Services Department at TML. This was done in part in response to the comment made during discussion that "reference librarians at TML spend most of their time answering questions about serials and missing issues."

b. Construction.

1. **Tompkins-McCaw Library.** A simple plan to close the stacks will be prepared by the Acquisitions Services Department. This plan will not require reshifting or relocation of the current periodicals stacks at TML, and to the greatest extent possible will employ existing furniture so that costs will be kept to a minimum. The periodicals service desk will be relocated to this new location.

2. **James Branch Cabell Library.** No major reconfiguration is required. Two changes result from the January 1987 reorganization of ULS: (a) to relocate the reserves materials to the first floor of Cabell Library (with the Circulation Services area), and (b) to relocate some microforms (primarily government document or related items, such as ERIC documents) to the first floor to be with the other government documents, as well as with the index tools to access them.

The additional space available in the current periodicals stacks will be used (a) to expand existing shelving for new titles, and (b) to create a larger work space for faculty and graduate students using periodicals in this area.

3. **Shelving.** The present types of shelving (flat shelving at JBC Library and display shelving at Tompkins-McCaw Library) will be retained.

c. Security of Materials.

1. **Tattle-taping Current Issues.** ULS will begin immediate tattle-taping of all issues of current periodicals as they are received, as well as retrospective taping of selected high use titles.

2. **Building Use Only.** The current policy of building use only for current periodicals will be retained in both libraries.

3. **Security Gates.** Because of the increased security measures, no additional security gates in the current periodicals areas will be installed in either library at this time. If the loss rate continues to be high this policy may be reevaluated.

d. Circulation Control.

1. Identification will be required of faculty and graduate students for entry into the current periodicals areas of both libraries, as well as for checking out of issues to make photocopies.

2. The present 3 issue limit per identification card will be maintained.

3. Manual circulation records will be maintained (however this may be reevaluated after ALIS is replaced).

4. Briefcases, book bags, etc. will be searched before the ID is returned.

5. Additional staff will be required to cover additional hours (6:00 to closing, M-F, Saturday and Sunday).

4. Miscellaneous Recommendations.

a. Policy and procedures manuals are now being developed for periodicals staff.

b. Efforts are underway to improve the training of the periodicals staff (including student assistants), and the quality of the service provided.

c. Additional services, such as providing staplers at each photocopier, will be explored by the Acquisition Services Department and provided if practical.

d. The quality of the binding of bound volumes will continue to be monitored. Specifications for commercial binder will be issued in an RFP in the 1987-88 fiscal year, and the bindery firm will be changed if necessary to improve quality.

e. The Acquisition Services Department will examine present signage and make necessary improvements in the current and bound periodicals areas. Information will be prepared and distributed about the circulation and use policies (such as the fine or overdue policies).

f. The current and next day's issues of the following papers will be available for checkout from the periodicals desks at TML and JBC: Richmond News-Leader, Richmond Times-Dispatch, New York Times, Washington Post, Wall Street Journal. If practical, other titles will be explored and purchased locally for same-day service.

Cost Analysis of Recommendations As Approved

Item	Costs Already Incurred	New Costs
Additional Vendacard machines	X	
New Photocopy Machines	X	
Reduced Cost per Copy		See footnote (1)
Increased Staff for TML current periodicals		$14,000. (2)
Renovation to close TML periodicals area		$ 3,000 max. (3)
Tattle tape current periodicals		$ 8,147 (4)
Project: link retrospective bound periodicals		$11,655 (5)
Link new bound periodicals	X	
Subtotal: One Time Costs		$14,655
Ongoing costs		$21,147
GRAND TOTAL First Year Cost (one time + first year ongoing):		$36,802

(1) It is impossible to predict whether decreases in photocopy costs will result in higher, stable or lower net revenue. The cost per copy on the new photocopiers should be lower than on the older equipment. In addition, there is some hard evidence in other libraries that substantial reduction in the cost per copy will greatly increase the number of copies made. Therefore, although there will be a decrease in profit margin, this may be partially if not fully offset by an increase in volume.

(2) Approximately 40 additional hours per week. Some of this support would have been required anyway because of the commitment made to establish the new periodicals desk at TML.

(3) There is no need for major construction of a wall. Low Westinghouse walls, a counter, or other furniture to "surround" the stack area is all that is intended.

(4) Ongoing costs: $2,493 per year staff cost and $5,654 for additional tattle tape. No one time costs.

(5) One time costs: $9,295 for staff and $2,360 operating (for OCR labels). The ongoing costs are already being absorbed.